



# A checklist of best practices for digital product design and usability evaluation

## 1. Orientation

### WHAT DO WE MEAN BY "DIGITAL PRODUCTS"?

"Digital product" is a broad term that includes websites, software, apps, eBooks, touchscreens, educational interactives, games, and any other content, presented in a digital interface, that is intended for use by a human.

### WHAT DO WE MEAN BY "BEST PRACTICES"?

What many people call "best practices," we call "essential practices." While digital products and platforms are constantly evolving, key steps in the development of those products have been well-known for years. The problem is that they are only employed sporadically. This checklist will help you ensure you have accounted for critical steps in planning, structuring, and testing your digital product.

## 2. The checklist of best practices for digital product design

### PLANNING THE PRODUCT: DIGITAL STRATEGY

Digital strategy begins with initial project meetings that include all key participants. The goal of these meetings is to create consensus on critical issues impacting the design of the product.

- ☐ Establish project phases using the industry-standard process for user-centric design:
  - Digital strategy
  - Project requirements
  - Information design
  - Development
  - Testing
  - Launch
- ☐ Define the following for the digital product:
  - Purpose for the product
  - End users for the product
  - The most important tasks the users will need to complete
- ☐ Identify the digital products to be designed, including:
  - Apps for smartphones or tablets
  - Touchscreen interactives
  - Websites
  - Software
  - eBooks
  - Digital editions
- ☐ Identify any existing constraints for the digital product
  - Organizational
  - Technical
  - Political
- ☐ Complete a competitive analysis of similar existing products
  - Identify five competing products
  - Examine them for assets (ideas you should incorporate) and liabilities (problems you should avoid)
- ☐ Assess staffing skill sets and responsibilities necessary for the success of the project
  - What relevant skill sets do you have in-house now?

- ☐ Designate key staff for the duration of the project
  - Management with a track record in digital development
  - Experienced digital project manager
  - Information architect
  - User interface designer
  - Usability testing expert
- ☐ Set objective, verifiable success metrics for the digital product
- ☐ Plan projected costs for digital production
  - Allocate an appropriate percent of the budget for information design (10%)
  - Allocate an appropriate percent of the budget for evaluation (8%)
  - Include an annual plan for on-going evaluation of the digital product to keep up with evolving user trends

## STRUCTURING THE PRODUCT: INFORMATION DESIGN

Information design is the crux of the digital product. This often-overlooked design phase is where design teams create the structure that supports the user as he interacts with the product. Key activities: Information architecture (grouping and labeling of content); task sequence design (step-by-step interaction design for complex transactions, such as those within apps or e-commerce functionality); and user interface design (the "blueprint" for the product's screen interface).

These activities will yield detailed design specifications to be handed off directly to the content, development, and visual design teams.

- ❑ Storyboard the user's ideal interaction with the digital product
  - Use prototyping to identify where and how users will interact
  - Achieve group consensus for initial prototypes
  - Create formal documentation from prototypes
- ❑ Complete an information architecture for each digital product
  - Employ prototyping to identify how content is structured and labeled
  - Achieve group consensus for initial prototypes
  - Create formal documentation from prototypes
- ❑ Complete task sequence design of key interactions for each digital product
  - Use prototyping to identify the step-by-step task sequence required to support the user as she interacts with the product
  - Achieve group consensus for initial prototypes
  - Create formal documentation from prototypes
- ❑ Complete user interface designs for key screens of each digital product
  - Use prototyping to design user interface "blueprints" (reflecting both the information architecture and task sequence design) as a grayscale line drawing
  - Achieve group consensus for initial prototypes
  - Create formal documentation from prototypes
  - No visual design elements are to be included in this document
- ❑ Maintain and update information design documentation as the product evolves
  - This is a key step in retaining your return on investment

### 3. The checklist of best practices for usability evaluation

#### VALIDATING THE PRODUCT DESIGN: USABILITY TESTING

Usability testing provides precise measurement of a user's interaction with your product; by administering a consistent usability test across different user groups, your team can see where your product succeeds or fails.

- ☐ Usability tests should be designed and conducted by persons not directly involved in the design of content
- ☐ Conduct usability testing at least once a year
  - Each redesign or upgrade of your product should be tested
- ☐ Define user types to be tested
  - User types should not be mixed together in testing
- ☐ Employ an objective third party to recruit test subjects
- ☐ Create a usability test design based on user goals and product objectives
  - Design task-based questions that allow the user to interact freely with the digital product
  - The usability test design needs to allow for unexpected user interactions with the digital product, with any significant findings captured
- ☐ Administer usability tests by interviewing users one-on-one
- ☐ Report your findings
  - Capture any common user-requested or needed changes in the digital product
  - Reflect quantifiable counts for completion of specific tasks
  - Report unexpected user interactions with the digital product
  - Record usability test sessions, with picture-in-picture video of the user interacting with the digital product